

# OpenDSD User Guide for PTS Projects

**DEVELOPMENT SERVICES**

## Overview

A **hybrid** system has been developed to use OpenDSD for the electronic submittal of project documents, and our current Project Tracking System for performing reviews and inspections. Some of the language on the website is specific to the Accela records that have been implemented and may not seem intuitive for the Hybrid projects, refer to the topics below for detailed instructions.

Reviewers will send out their **cycle issues report** as they complete each cycle, but resubmittal can only happen after all reviews have been complete. Address all cycle issues prior to resubmitting any new plans, you cannot resubmit to each specific discipline, resubmittals are for all disciplines at the same time.

For help with User Accounts or Uploading Documents email [DSD-OpenDSDHelp@san Diego.gov](mailto:DSD-OpenDSDHelp@san Diego.gov)

For project status or questions about your project complete the [Project Status Request form](#)

## Topics – Click on the links below to skip to the specific sections

1. [Requesting a Project Setup for Permit or Construction Change](#)
2. [Submitting Documents for Project Review Initial Submittal / Updates Required / Recheck Required / Issuance Checklist Items](#)
3. [Submitting “Ready for Final Version” Documents](#)
4. [Downloading Approved Plans](#)
5. [Frequently Asked Questions \(FAQs\)](#)

## Rules

- All **NEW** projects, corrections and construction changes need to be submitted electronically.
- All project types qualify for electronic document submittal (Building, Discretionary, Engineering, Mapping, Construction Change, etc.)

## Website and Login

1. Visit [OpenDSD website](#)
2. [Create/register for new User Account](#). For information regarding set up of an account and details of the account functionality, [click here](#). Having trouble creating an account? Email [DSD-OpenDSDHelp@san Diego.gov](mailto:DSD-OpenDSDHelp@san Diego.gov)
3. 1 hour time out from login time
4. ‘Save and Resume’ button shown on website does not apply to Hybrid Accela/PTS projects

## Plan Requirements

- PDF format only.
- **Plans must have the PTS # printed on them for final version.**
- Plans must be landscape oriented and must be all on same sized sheets.
- Files shall be limited to 100MB. **When uploading documents, if there are multiple files that make up your design documents, you must select consecutive volumes for each file being submitted (e.g. Building/Construction Plans, Building/Construction Plan Vol. 2, etc.). Each document type can only be used**

## Terms

### Initial Submittal

First time submittal of documents for Completeness Review

### Submitted

Documents have been uploaded and the portal closed for uploading

### Completeness Review

Review by staff to see if uploaded documents meet minimum submittal requirements and are ready for Discipline Reviews

### Updates Required

Submittal is not Deemed Complete and either additional documents are needed or revisions to submitted documents are required. Portal open for uploading

### Approved

Permit has been issued in PTS

### Recheck Required

Plans have been reviewed and have corrections (Cycle Issues Report and Submittal Requirements provided through PTS and available on OpenDSD) Repeat until all issues are signed off

### Ready for Final Version

All disciplines have completed reviews and cleared outstanding issues. Awaiting upload of plan set reflecting all corrections for comparison to approved version

### Ready for Issuance

Plans have been stamped and required items identified in the Project Tracking System (PTS) Submittal Requirements Report for permit issuance.

once per submittal or you will overwrite the previously uploaded document. If you have multiple documents of the same document type (for example, Specifications), combine them into one file for upload.

- **Flatten all drawing layers** in your CAD program before creating the PDF. Pages must be straight, clear with no streaks; sheets must be contrasting with background and not too light or dark.
- Do not submit 'password protected' or 'locked' documents. The Security Method must be set to "No Security". No security certificates can be in place.
- Failure to submit correctly will result in the submittal being returned, which will delay review.

## File Organization

- Each document will be uploaded individually; do not combine documents. Example; Building Construction Plans and Reports are separate documents, but Building Construction Plans can contain Architectural, Structural, Elevations, and Detail sheets, etc.
- Refer to the [Project Submittal Manual](#) for required documents

## Requesting a Project Setup

Step	Action	Screen Reference
------	--------	------------------

1

1. In [OpenDSD](#)
2. Select 'Apply for a Permit'
3. Select Permit Type
4. Fill out the required\* fields
5. Click → Submit

**Applicant Information**

Name \*

Address \*

Email \*

Phone \*

**Project Information**

Project Number (if applicable)

Project Address \*

Assessor Parcel Number \*

Project Scope \*

**Submit**

2



You will receive this message

**Thank you. Your submission has been received.**

[Go back to the form](#)

3

A system generated email will be sent.  
DSD staff will set up your project in PTS and you will receive a follow up email providing the new PTS #


webmaster@sandiego.gov
 D'Orsi, Donna

**[EXTERNAL] Thank you for submitting your project (City of San Diego)**

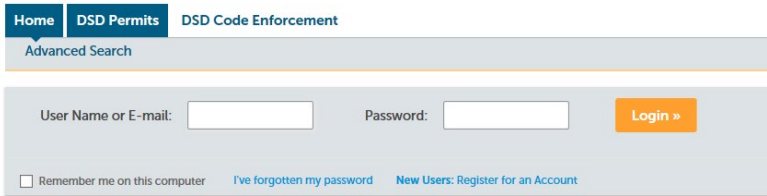


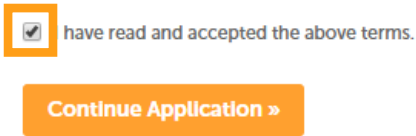
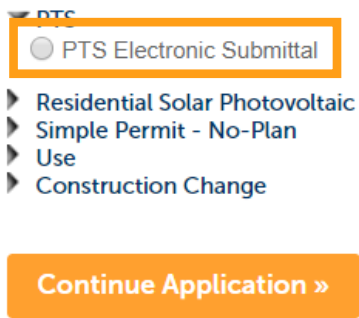
ⓘ We removed extra line breaks from this message.

**\*\*This email came from an external source. Be cautious about clicking on any links in this email or opening attachments.\*\***

Development Services received your submission below. We will contact you within **five (5) business days** for additional information.

**SUBMITTAL TYPE:**  
Building Permit (includes Mechanical, Electrical, and Plumbing Permit)

## Submitting Documents for Project Review Initial Submittal / Updates Required Recheck Required / Issuance Checklist Items

Step	Action	Screen Reference
1	Log in	
2	Click on "DSD Permits"	
3	Click on "Create an Application"	
4	Accept the Disclaimer and click "Continue Application"	
5	<ul style="list-style-type: none"> <li>Select <b>PTS Electronic Submittal</b> record.</li> <li>Click "Continue Application"</li> </ul>	

6

Enter the PTS project number provided in the email.

Answer **No**.

Click "Continue Application"

**Custom Fields**

**PROJECT VALIDATION**

\*Enter PTS Project ID:

\*Is this submittal for a Final Version?:

Make sure you include the leading 0 PTS-0XXXXXX

Each time, answer "No" until asked to upload Final Version

Continue Application »

7

On the Document Upload page, select "Add"

**Step 2: Documents > Upload**

**Attachment**

To upload attachments:

1. Click Add to start the process
2. Click Add for each file to upload
3. Click Continue when done
4. Click Save after entering any additional information

The Last Update columns will say Pending until all attachments have been uploaded.

The maximum file size allowed is 100 MB.  
PDF is the only allowed file type to upload.

Name	Type	Size
No records found.		

Add

Save and resume later

8

- Select "Add" again to choose file to upload
- Repeat until all documents are uploaded
- 

**File Upload** ×

The maximum file size allowed is 100 MB.  
PDF is the only allowed file type to upload.

Continue Add Remove All Cancel

9

Identify each document you uploaded from the drop-down menu and provide a description of each document.

1. Click "Save" after adding descriptions
2. Then, click "Continue Application"
3. 'Save and Resume' button shown on website does not apply to Hybrid Accela/PTS projects

5.

The screenshot shows a form for adding a document. A blue arrow points to the 'Type' dropdown menu, which is set to 'Building Construction Plans', with the annotation 'Identify document type'. Another blue arrow points to the 'Description' text area, which contains the text 'Initial submittal for plan review', with the annotation 'Add description of document'. Below the text area are three orange buttons: 'Save', 'Add', and 'Remove All'. An orange arrow points to the 'Save' button. At the bottom right of the form is an orange button labeled 'Continue Application »'.

10

1. Review documents that were uploaded.
2. 'Add' additional documents, if needed.
3. Click 'Continue Application'
4. 'Save and Resume' button shown on website does not apply to Hybrid Accela/PTS projects

The screenshot shows the 'Attachment' section. It includes instructions for uploading attachments: 1. Click Add to start the process, 2. Click Add for each file to upload, 3. Click Continue when done, 4. Click Save after entering any additional information. It also states: 'The Last Update columns will say Pending until all attachments have been uploaded.' Below this, it says: 'The maximum file size allowed is 100 MB. PDF is the only allowed file type to upload.' A table lists the uploaded files:

Name	Type	Size
GOOD_Plans_2MB.pdf	Building Construction Plans	1.91 MB


Below the table is an orange 'Add' button.

11

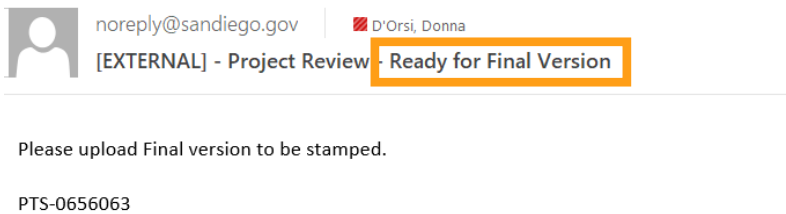
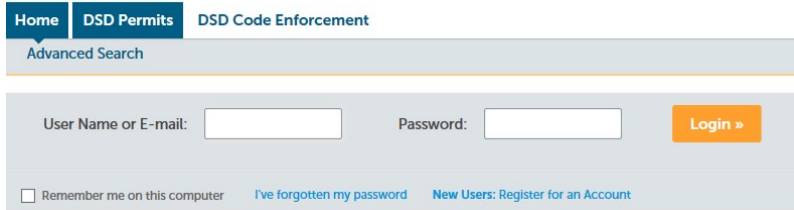


Agree to the certification and click 'Continue Application'

'Save and Resume' button shown on website does not apply to Hybrid Accela/PTS projects

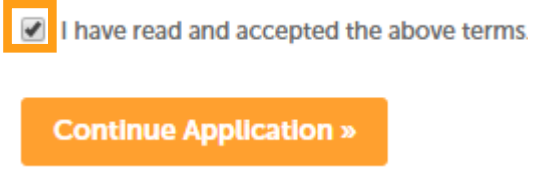
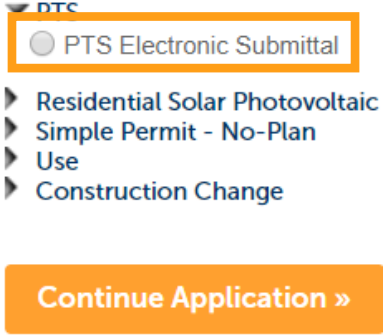
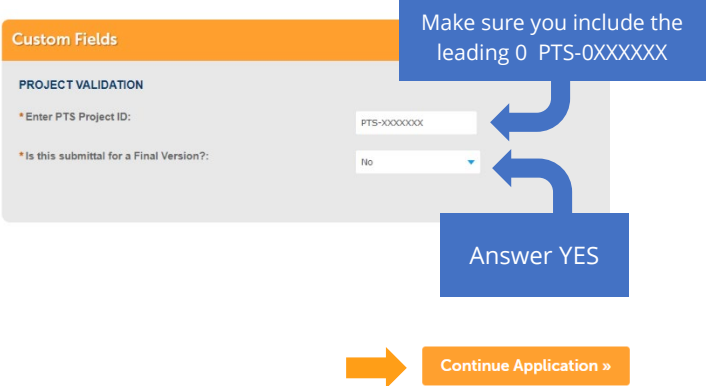
The screenshot shows a certification agreement section. It contains the text: 'I certify that I have read and understand the instructions that accompany this information has been omitted. By checking the box below, I understand...'. Below this text is a checkbox that is checked, followed by the text: 'By checking this box, I agree to the above certification.' At the bottom right is an orange button labeled 'Continue Application »'.

12	You will see this message	
13	Document submittal will go through Completeness Review by Intake Staff	Wait for next communication from DSD

## Submitting "Ready for Final Version" Documents

Step	Action	Screen Reference
	You received an email notification to resubmit documents Final Version Comparison.	
1	Log in	
2	Click on "DSD Permits"	
3	Click on "Create an Application"	



4	<p>Accept the Disclaimer and click "Continue Application"</p>	
5	<ul style="list-style-type: none"> <li>• Select PTS Electronic Submittal record.</li> <li>• Click "Continue Application"</li> </ul>	
6	<p>Enter your PTS project number.</p> <p>Answer <b>YES</b> (This is the only time you answer YES)</p> <p>Click "Continue Application"</p>	

On the Document Upload page, select  
"Add"

7

**Step 2: Documents > Upload**

**Attachment**

To upload attachments:

1. Click Add to start the process
2. Click Add for each file to upload
3. Click Continue when done
4. Click Save after entering any additional information

The Last Update columns will say Pending until all attachments have been uploaded.

The maximum file size allowed is 100 MB.  
PDF is the only allowed file type to upload.

Name	Type	Size
No records found.		

**Add**

**Save and resume later**

Select 'Add'

Only upload Final Version of Plans to be  
stamped.

8

**File Upload**

The maximum file size allowed is 100 MB.  
PDF is the only allowed file type to upload.

**Continue** **Add** **Remove All** **Cancel**

9

Identify each document you uploaded from the drop-down menu and provide a description of each document.

1. Click "Save" after adding descriptions
2. Then, click "Continue Application"
3. 'Save and Resume' button shown on website does not apply to Hybrid Accela/PTS projects

The screenshot shows a form for adding a document. A blue arrow points to the 'Type' dropdown menu, which is set to 'Building Construction Plans', with the annotation 'Identify document type'. Another blue arrow points to the 'Description' text area, which contains the text 'Initial submittal for plan review', with the annotation 'Add description of document'. An orange arrow points to the 'Save' button. At the bottom right, there is an orange button labeled 'Continue Application »'.

10

1. Review documents that were uploaded.
2. 'Add' additional documents, if needed.
3. Click 'Continue Application'
4. 'Save and Resume' button shown on website does not apply to Hybrid Accela/PTS projects

The screenshot shows the 'Attachment' section. It includes instructions for uploading attachments: '1. Click Add to start the process', '2. Click Add for each file to upload', '3. Click Continue when done', and '4. Click Save after entering any additional information'. It also states: 'The Last Update columns will say Pending until all attachments have been uploaded.' Below this, it says: 'The maximum file size allowed is 100 MB. PDF is the only allowed file type to upload.' A table lists the uploaded file:

Name	Type	Size
GOOD_Plans_2MB.pdf	Building Construction Plans	1.91 MB


Below the table is an orange 'Add' button.

11

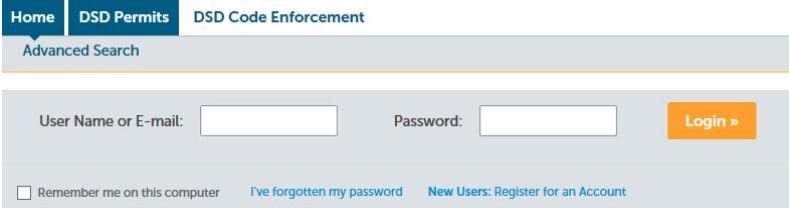
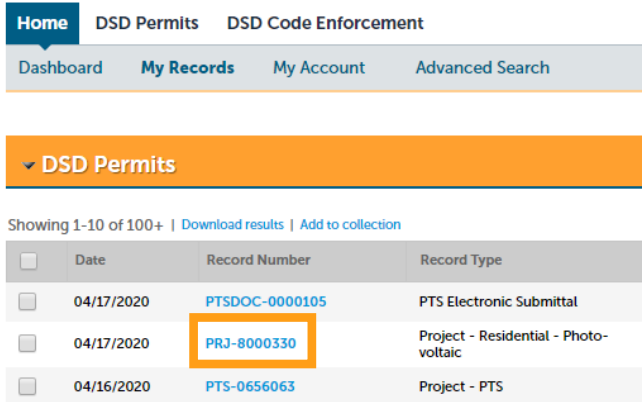
Agree to the certification and click 'Continue Application'

'Save and Resume' button shown on website does not apply to Hybrid Accela/PTS projects

The screenshot shows a certification section with the text: 'I certify that I have read and understand the instructions that accompany this information has been omitted. By checking the box below, I understand...'. Below this text is a checkbox that is checked, with the text 'By checking this box, I agree to the above certification.' At the bottom right, there is an orange button labeled 'Continue Application »'.

12	You will see this message	
13	Document submittal will go through Completeness Review by Intake Staff	Wait for next communication from DSD

## Downloading Approved Plans

Step	Action	Screen Reference
1	Log in	
2	1. Search for Approved PTS record 2. Click on Record Number	

3

1. Use the Record Info Drop Down.
2. Select 'Attachments'.
3. Click on Building Construction Plans.



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Record PTS-0656063:

## Project - PTS

Record Status: Approved

Record Info ▾

Payments ▾

Record Details

Processing Status

Related Records

Attachments

Inspections

The Last Update columns will say Pending until all attachments have been uploaded.

The maximum file size allowed is 400 MB.  
PDF is the only allowed file type to upload.

Name	Record ID	Record Type	Type	Size
Building Construction Plans PTS-0656063.pdf	PTS-0656063	Project - PTS	Building Construction Plans	557.32 KB
General Application (DS-3032) PTS-0656063.pdf	PTS-0656063	Project - PTS	General Application (DS-3032)	557.32 KB

## ► Frequently Asked Questions (FAQs)

### **Do I need an account to submit projects?**

Yes, login to your [OpenDSD](#) account to apply for a permit, if you don't have an account see [help tutorial](#) and watch the [video](#).

### **Who do I contact if I need help?**

[DSD-OpenDSDHelp@sandiego.gov](mailto:DSD-OpenDSDHelp@sandiego.gov)

## **Record Structure**

**PTS-0XXXXXX:** This is where the status is tracked and the workflow is progressed. After each "Submittal" is either "Deemed Complete" or "Updates Required," the package documents will be copied to this PTS record and be visible there

### **Jump to:**

- [What does it mean when my PTS-0XXXXXX status is...?](#)
- [I uploaded the wrong document for my initial project submittal. Who do I contact?](#)
- [When I try to upload, I keep getting an error message. Why does this keep happening?](#)
- [Where can I locate my projects for DSD Permits \(Development Services Department projects\)?](#)
- [It has been 6 days and I have not received correspondence after my submittal. I didn't even get a confirmation email. Who do I contact about this issue?](#)
- [How do I retrieve a forgotten username or password?](#)
- [I found an option on my account that says, "Add a Delegate." What does that mean?](#)
- [What does "Add Collection" mean?](#)
- [I noticed my customer information is incorrect. Who do I contact to correct this issue?](#)
- [Hints and tips for a successful submittal with multiple documents](#)

## What does it mean when my PTS-0XXXXXX status is...?

### **Opened**

Project has been created and is awaiting document upload

### **Updates Required**

Submittal is not Deemed Complete and either additional documents are needed or revisions to submitted documents are required, refer to email sent and upload new requested items.

### **Deemed Complete**

Documents meet minimum submittal requirements and are ready for Discipline Reviews

### **In Review**

Plans have been routed for review assignment, track progress in [OpenDSD](#)

### **Ready for Final Version**

All disciplines have signed off, upload plans with all corrections incorporated for comparison.

### **Final Version Submitted**

You have uploaded final version for comparison and stamping by staff

### **Ready for Issuance**

Plans have been stamped and required items identified in the Project Tracking System (PTS) Submittal Requirements Report for permit issuance.

### **Approved**

Your permit has been issued in PTS.

---

## I uploaded the wrong document for my project submittal. Who do I contact?

You will not be able to upload any documents, once your documents are in **"Submitted"** status. You will need to wait until the cycle is processed by staff and they change the status to 'Updates Required' so you can upload your new version.

\*\*\* If your project is **"In-Review,"** you will also not be able to upload additional documents to the project \*\*\*

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## When I try to upload, I keep getting an error message. Why does this keep happening?

This usually means one of two things:

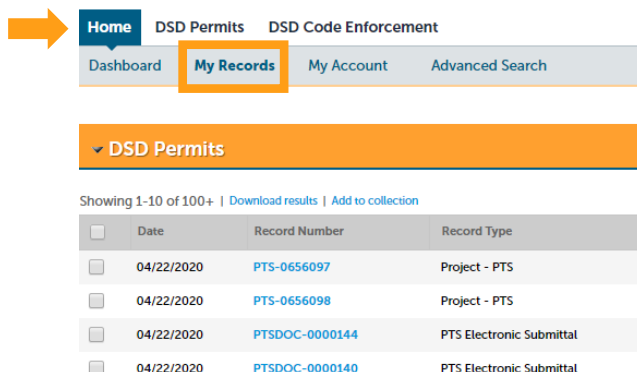
1. You have not formatted the PTS-0XXXXXX number correctly when entering it, or:
2. You are trying to upload using the "Attachments" link under the "Record Info" tab. You need to start each document upload with "Create an Application"
3. Your project is in 'Submitted' status and therefor will not allow uploads, this is to limit new versions being uploaded while the documents are being processed or the project is in review.

Contact [DSD-OpenDSDHelp@sanidiego.gov](mailto:DSD-OpenDSDHelp@sanidiego.gov) if this persists

## Where can I locate my projects for DSD Permits (Development Services Department projects)?

- To see only PTS records (no PTSDOC records), from the 'Home' tab, click the 'My Records' link (see right)
- You can also locate projects **by specific status** by clicking on "DSD Permits", you will be able to view your projects under "Records" (see below).

If you click on the "Select" drop down it will give you a list of statuses you can choose from



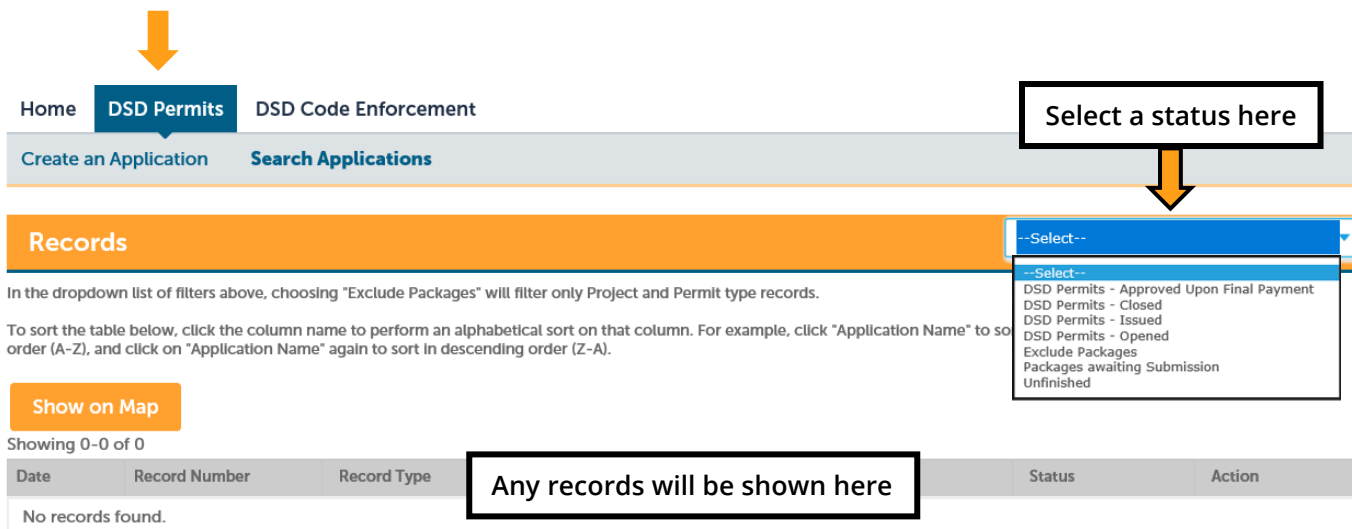
Home DSD Permits DSD Code Enforcement

Dashboard **My Records** My Account Advanced Search

▼ DSD Permits

Showing 1-10 of 100+ | Download results | Add to collection

<input type="checkbox"/>	Date	Record Number	Record Type
<input type="checkbox"/>	04/22/2020	PTS-0656097	Project - PTS
<input type="checkbox"/>	04/22/2020	PTS-0656098	Project - PTS
<input type="checkbox"/>	04/22/2020	PTSDOC-0000144	PTS Electronic Submittal
<input type="checkbox"/>	04/22/2020	PTSDOC-0000140	PTS Electronic Submittal



Home **DSD Permits** DSD Code Enforcement

Create an Application Search Applications

**Records**

In the dropdown list of filters above, choosing "Exclude Packages" will filter only Project and Permit type records.

To sort the table below, click the column name to perform an alphabetical sort on that column. For example, click "Application Name" to sort order (A-Z), and click on "Application Name" again to sort in descending order (Z-A).

Show on Map

Showing 0-0 of 0

Date	Record Number	Record Type	Status	Action
No records found.				

Select a status here

--Select--

- Select--
- DSD Permits - Approved Upon Final Payment
- DSD Permits - Closed
- DSD Permits - Issued
- DSD Permits - Opened
- Exclude Packages
- Packages awaiting Submission
- Unfinished

Any records will be shown here

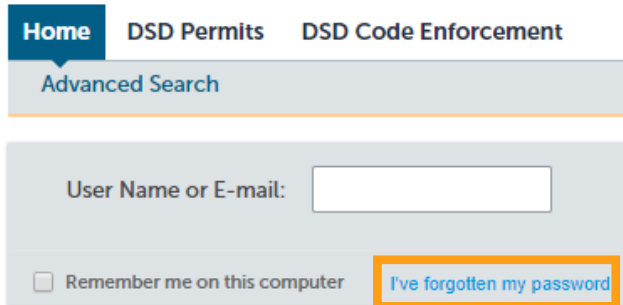
It has been 6 days and I have not received correspondence after my submittal. I didn't even get a confirmation email. Who do I contact about this issue?

You can fill out [an electronic Project Status Request form](#)



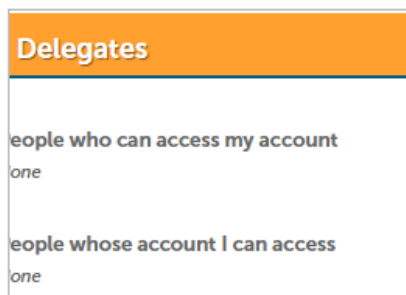
## How do I retrieve a forgotten username or password?

Use the 'Forgot Password' link on the [OpenDSD](#) Home Page



## I found an option on my account that says, "Add a Delegate." What does that mean?

Delegates can be added to your account so that other users can access the account. Use the Account Management link at the upper right of [OpenDSD](#) Login page. Note that in order to be a delegate, the user must be registered with an existing account.



## What does "Add Collection" mean?

A Collection allows you to group records for easy retrieval. It doesn't remove records from the 'My Record' list but creates a subset that allows you to view only the records in the group. You can name them, provide a description, and delete a collection at any time (continued on next page).

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Records

In the dropdown list of filters above, choosing "Exclude Packages" will filter only Project and Permit type records.

To sort the table below, click the column name to perform an alphabetical sort on that column. For example, click "App" sort in descending order (Z-A).

Showing 1-10 of 31 | [Download results](#) | [Add to collection](#)

☐ Date
 ☐ Record N

☐ 04/16/2020
 [PTSDOC-](#)

☐ 04/15/2020
 [PTSDOC-](#)

☐ 04/15/2020
 [PTSDOC-](#)

☐ 04/15/2020
 [20TMP-0](#)

☐ 04/15/2020
 [PTSDOC-](#)

☐ 04/15/2020
 [PTSDOC-](#)

☐ 04/15/2020
 [PTSDOC-](#)

☒ Create a New Collection

\*Name:

Description:

Submittal

PTS-0656062

Submittal

PTS-0656053

Submittal

PTS-0656056

Submittal

PTS-0656056

Submittal

PTS-0656005

Submittal

PTS-0656056

Submittal

PTS-0656056

DashboardMy RecordsMy AccountAdvanced Search

## Pending

some description

Total Records: 2 (2 DSD Permits)

Inspections Summary: 0 (0 Scheduled, 0 Rescheduled, 0 Approved, 0 Denied, 0 Pending, 0 Cancelled)

Fees Summary: \$0.00 Paid, \$0.00 Due

### DSD Permits

[Move to...](#) | [Copy to...](#) | [Remove](#)

Showing 1-2 of 2 | [Download results](#)

<input type="checkbox"/>	Date	Record Number	Record Type	Application Name	Description	Status	Action
<input type="checkbox"/>	04/17/2020	<a href="#">PRJ-8000330</a>	Project - Residential - Photo-voltaic	Project - Residential - Photo-voltaic:1250/Heritage		In Queue	
<input type="checkbox"/>	04/15/2020	<a href="#">PRJ-8000329</a>	Project - Residential - Photo-voltaic	Project - Residential - Photo-voltaic:3260/Anella		In Review	

I noticed my customer information is incorrect. Who do I contact to correct this issue?

Fill out a [Project Status Request Form](#) and provide the correct information.

## Hints and tips for a successful submittal with multiple documents

1. Be organized. Create a folder for your Project. Name all the files based on what the document type is going to be. Split these up into batches of 5 files per folder
2. In Accela, when you click ADD, go to the Project, first folder, and add all the files in it, one after the other, then CONTINUE
3. Label all the files and provide the description, use the version of the submission, then SAVE
4. After it saves, click ADD, go to the next folder with your files, and add those one after the other, then CONTINUE

5. Label, provide description, then SAVE and repeat until you are done.
6. Do not upload a document type more than once, it will overwrite the previous document. If you have more than 1 document for calculations, combine them into 1 pdf for upload.
7. Only Building Construction Plans allows you to upload Volume #'s